

Figure 1

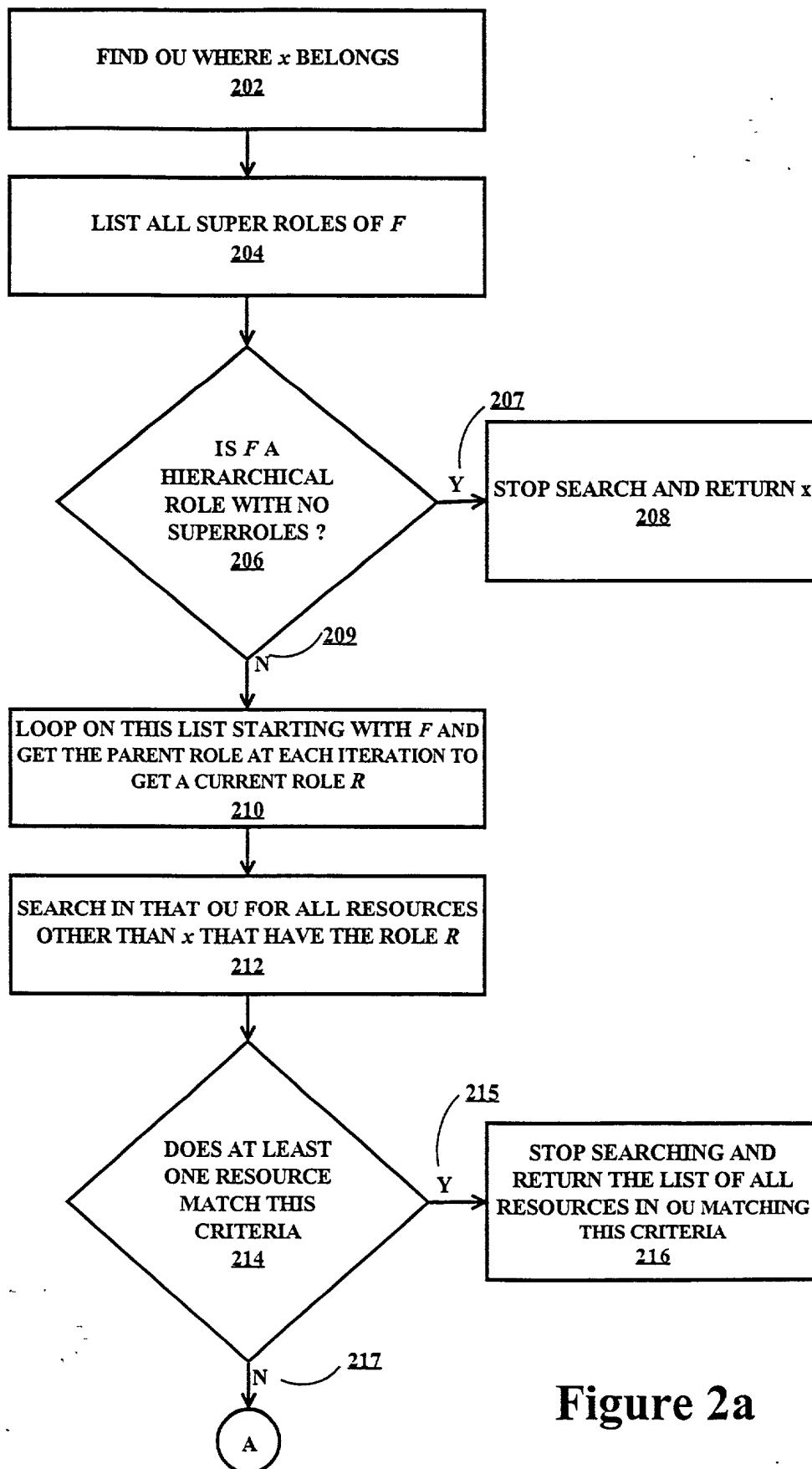


Figure 2a

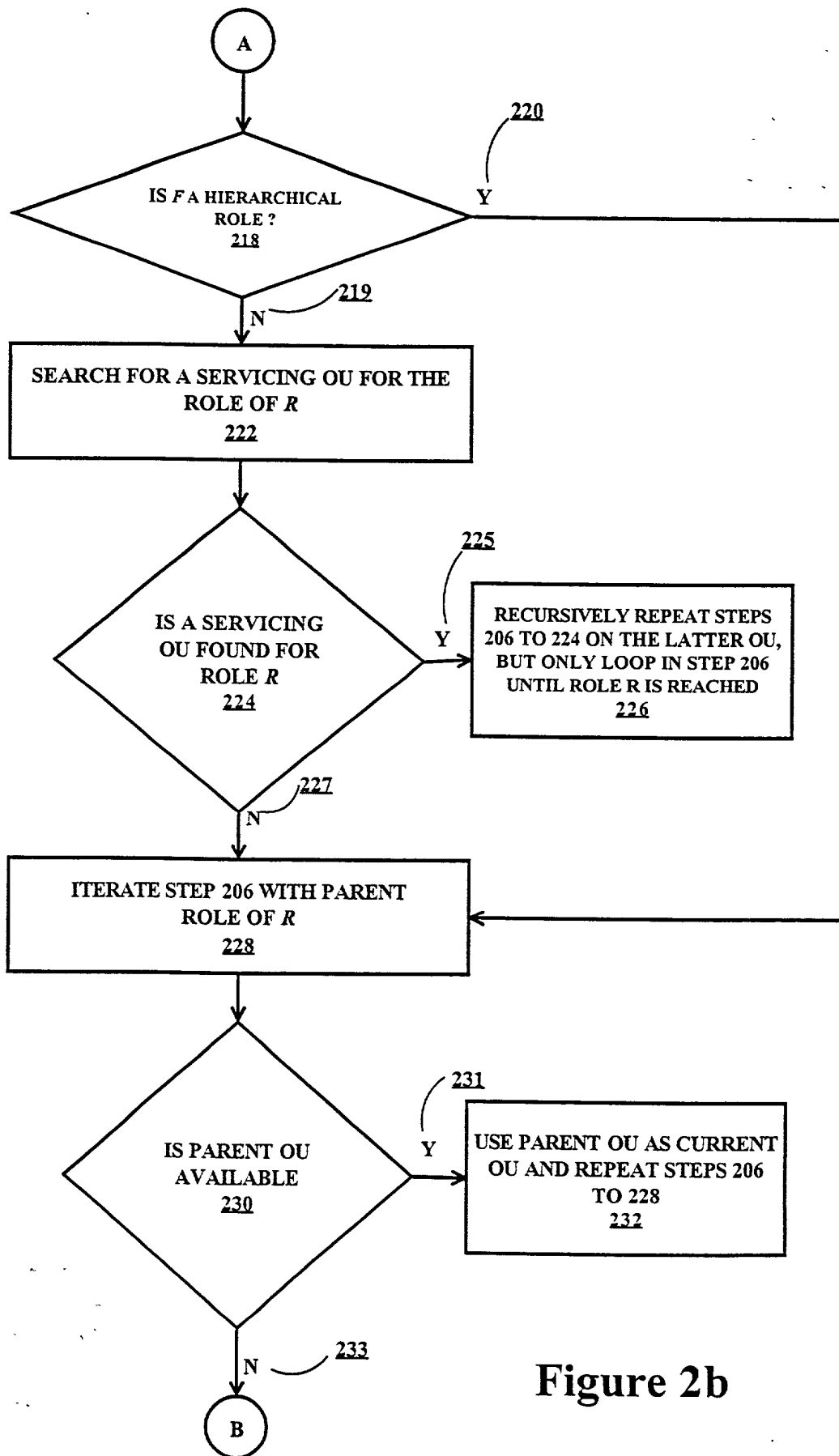


Figure 2b

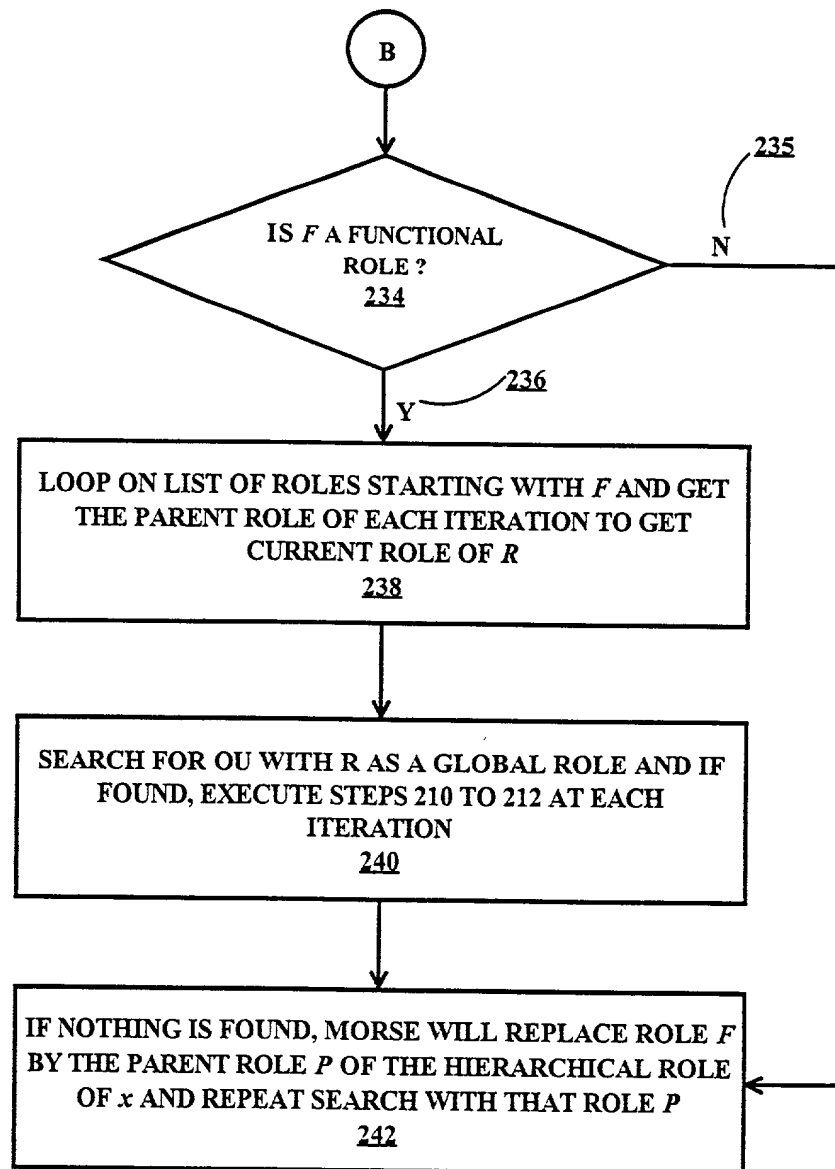


Figure 2c

300

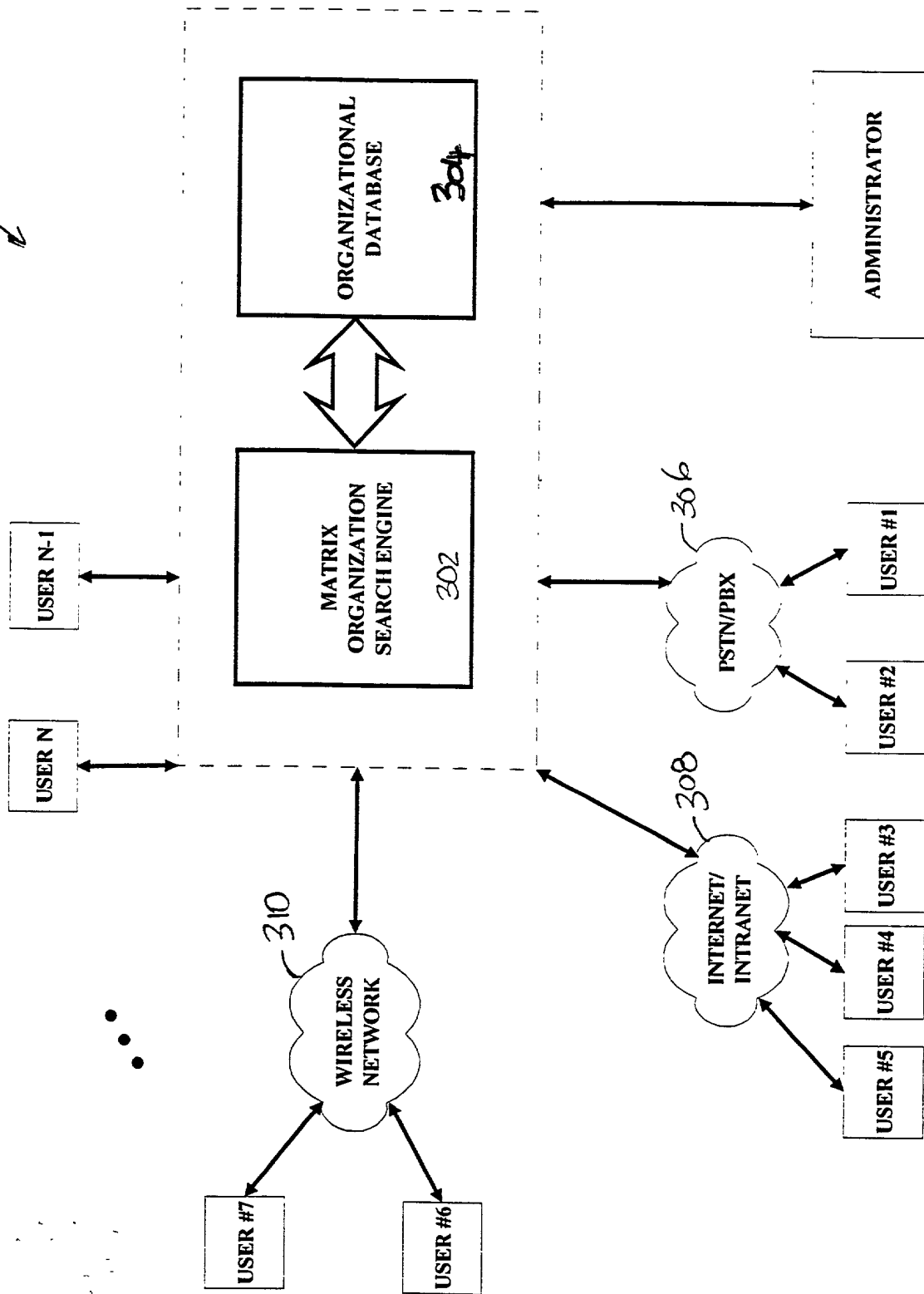


Figure 3

400

AP

408

404

412 414 416 418 420

406

422

402

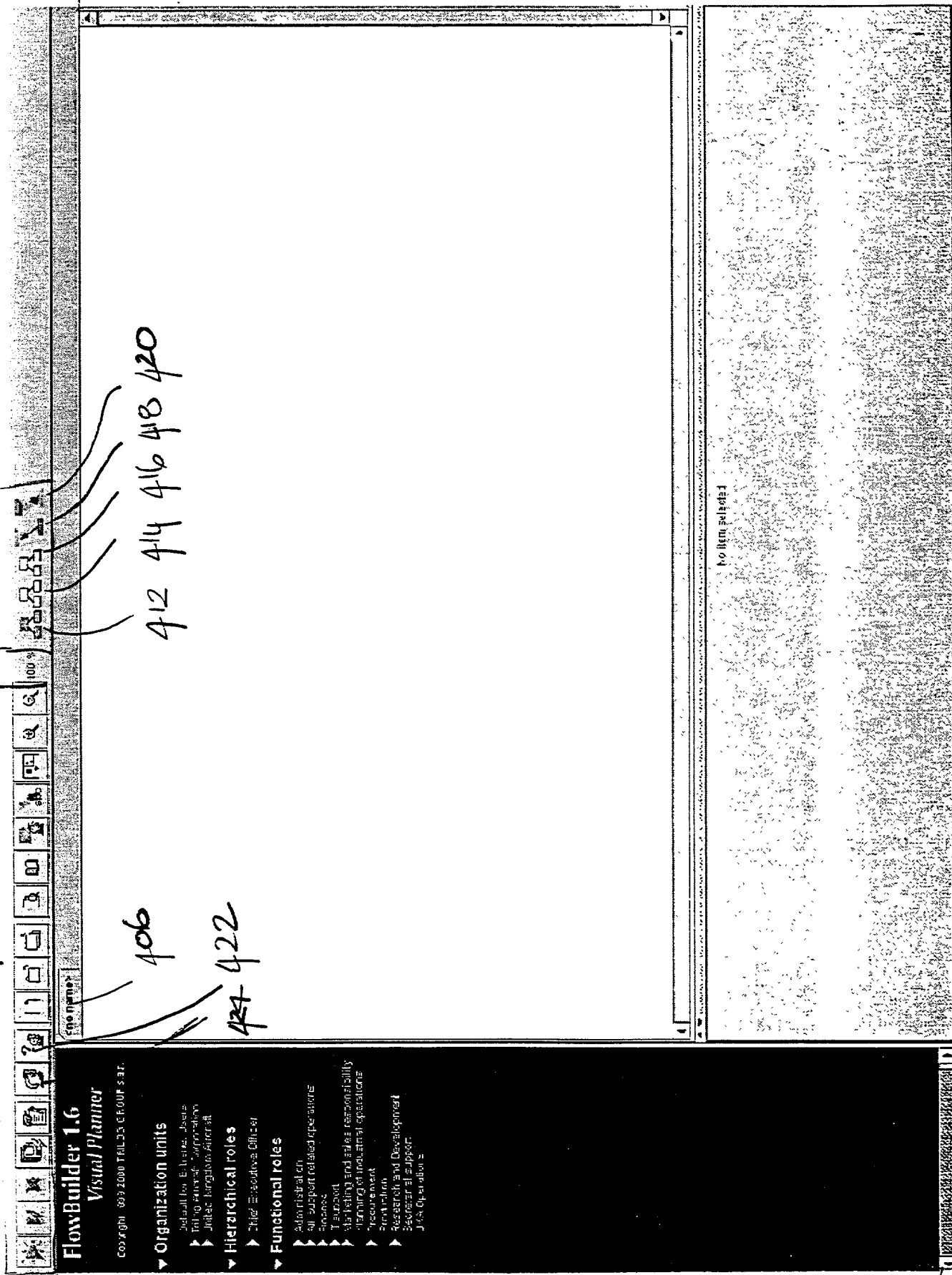


Figure 4
















BUTTON	FUNCTION
<b>New Object</b> 	Creates a new object (from the same object type as that which is presently highlighted in the Object Store). For instance, if an organization unit object type were highlighted in the Object Store, this button would create a new, unnamed organization unit in the design area.
<b>Edit</b> 	Edits the currently selected object. When selected, a dialog box opens, showing the attributes of the selected object.
<b>Delete</b> 	Deletes the currently select ed object.
<b>Save Changes</b> 	Commits all changes made to the organization definition.
<b>Show Actions</b> 	Displays a list of all organization changes made since the last save.
<b>Show People</b> 	Displays a listbox containing the names of all people who are defined in the organization, whether or not they've been assigned to organization units.
<b>MORSE Search</b> 	Performs a "MORSE Search" to test role evaluation in your organization definition. It is not necessary to have an application design or even a workflow process to perform a MORSE test. Evaluation is based solely on the relationships defined in the Visual Planner (or Planner database, from the Notes client).
<b>New View</b> 	Opens a new view in the design area. Views are tabbed and labeled according to the name of the parent object in the view.
<b>Close View</b> 	Closes the current view in the design area.
<b>Close All Views</b> 	<p>Closes all open views in the design area.</p> <p><i>Neither of the two "Close" options will discard changes the user has made in an open view. Selecting the option to "Save" your changes will retain all changes made through the viewing panes, even if the user has subsequently closed the views.</i></p>
<b>Printing and Setup</b> 	These three buttons implement the standard printing functions – Print, Print Preview, and Page Setup.
<b>Show/Hide People</b> 	Displays the list of all people who are assigned to each role, within either a functional role view, hierarchical role view or an organization unit view.
<b>Show/Hide Functional Link</b> 	Displays the names of the functions that are provided, along functional links. For instance, if a red line exists between two organizations (indicating a functional link), clicking on this button will display the names of the functions shared between two organizations to be displayed.
<b>Show/Hide Watcher</b> 	Displays a miniature view of the organization or role tree in the upper right corner of the design area. This functionality is most useful when viewing/creating a large tree in the design area that does not fit in the standard design window. From the Watcher, you can position your main viewing window to other parts of the tree, just by moving the view port within the Watcher.
<b>Zoom</b> 	<p>Zooms in or out on the view, in increments of 25% up or down.</p> <p>The present "zoom level" is displayed to the right of the zoom out button.</p>

Figure 5




BUTTON	FUNCTION
<b>Organization Elements</b> 	<p>Adds organization elements to the active view with a simple drag-and-drop operation (clicking and holding, then dragging the object to the active view in the design area).</p> <p>Placing the leftmost icon in the design area creates a new <i>organization unit/view</i>; placing the center icon in the design area creates a new <i>hierarchical role/view</i>; and, placing the rightmost icon in the design area creates a new <i>functional role/view</i>.</p> <p>In any given view, only one type of item may be maintained. For instance, after you have created a new organization unit in the current view, the other two organization elements are inactivated for that view.</p>
<b>Hierarchical Link</b> 	<p>Defines a hierarchical link between "child" and "parent" organization elements.</p> <p>Hierarchical links are added by dragging the link object to the "child" and dropping (the organization element will change background color when a link is recognized), followed by clicking once on the "parent" element.</p>
<b>Functional Link</b> 	<p>Defines functional links between organization units, and is therefore activated only while in an organization unit view.</p> <p>Functional links are added with the same drag-and-drop operation as with the hierarchical link (above). The first item that you drop the link onto becomes the "serviced" or "client" organization, and the second organization unit, where the link is terminated, becomes the "servicing" organization.</p>

Figure 6



706 702 704 700

Name: Org Test A

Label: Corporate

Serviced units: Functions

700

Figure 7

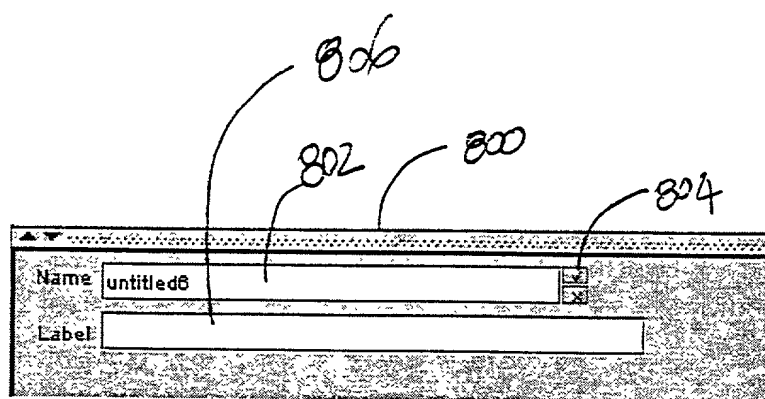


Figure 8

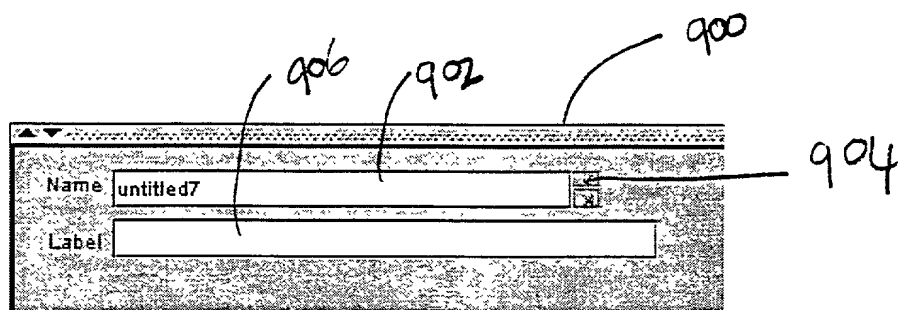


Figure 9

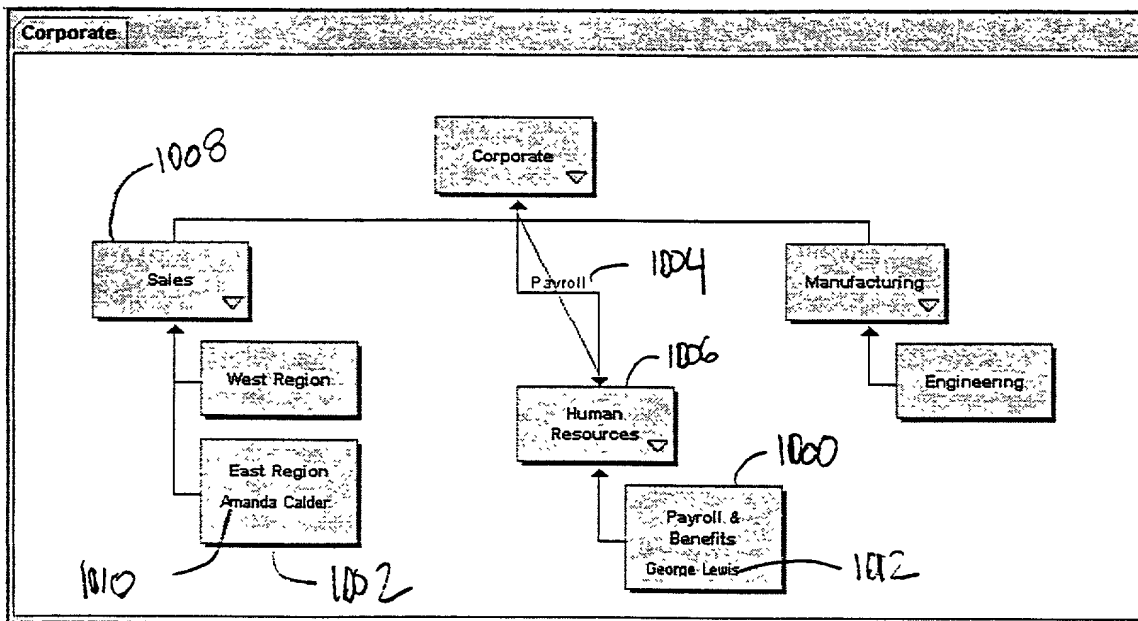


Figure 10

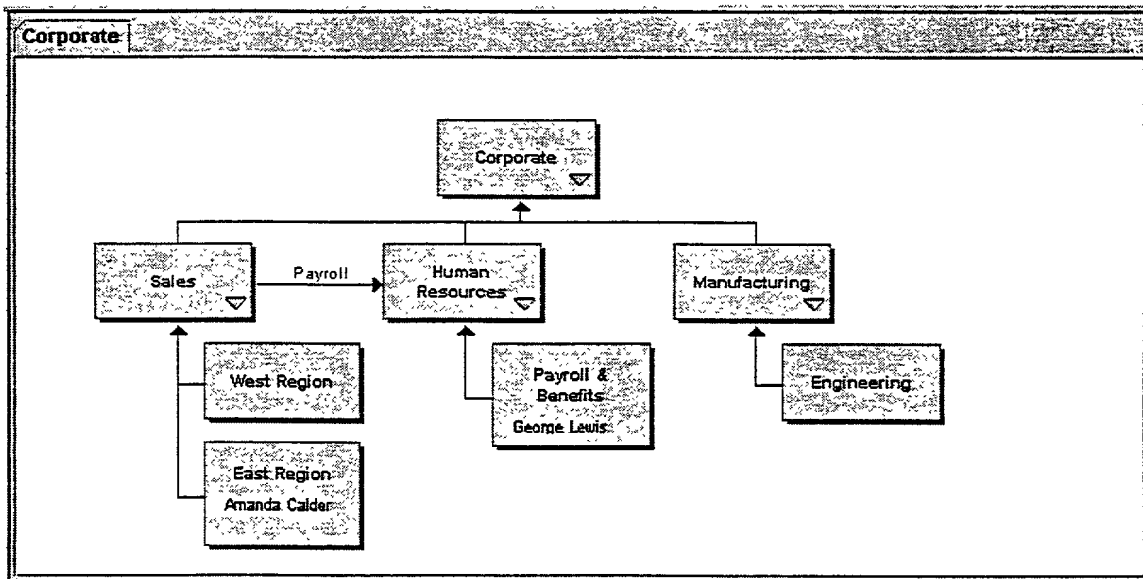


FIGURE 11

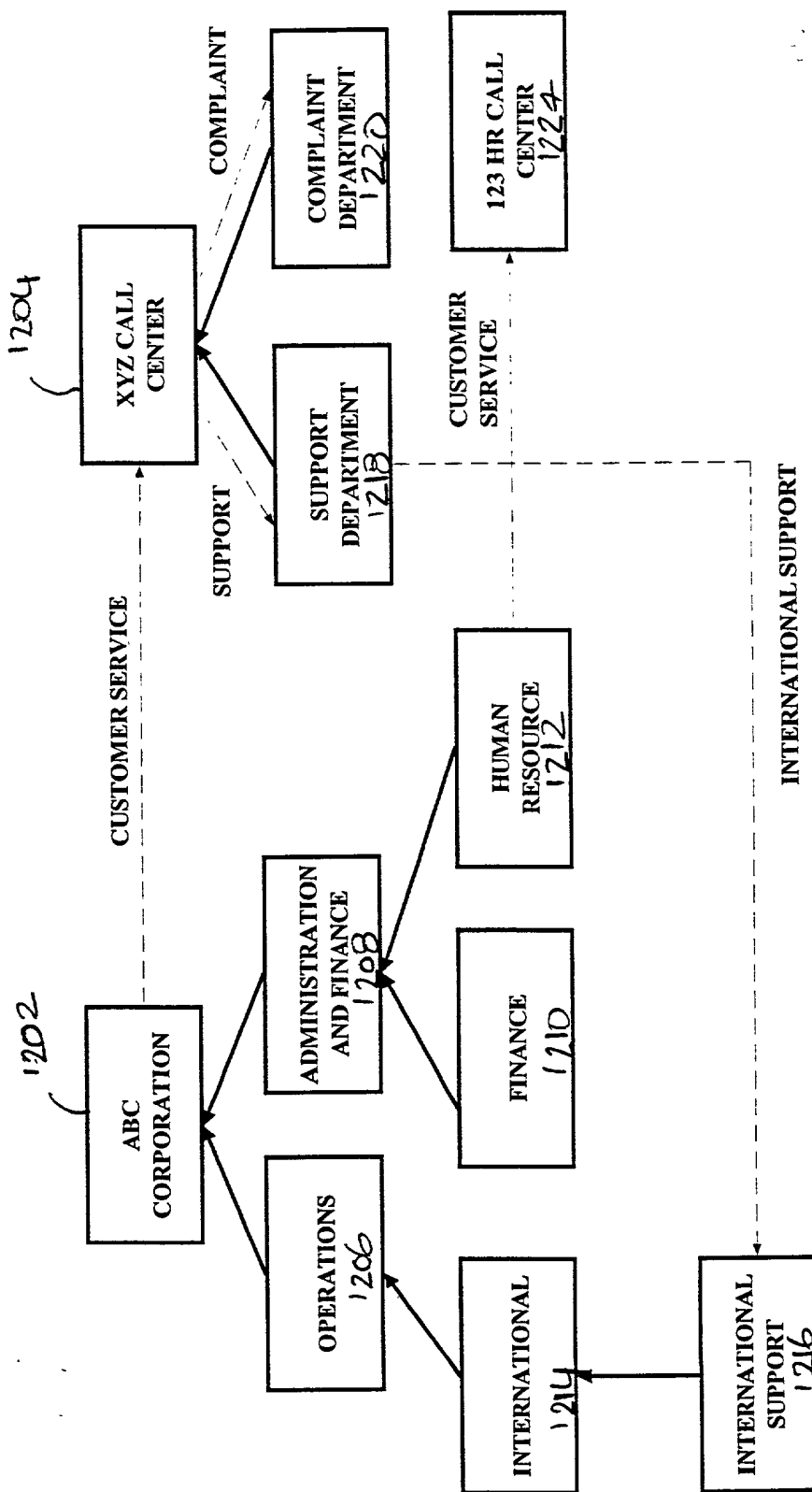


Figure 12

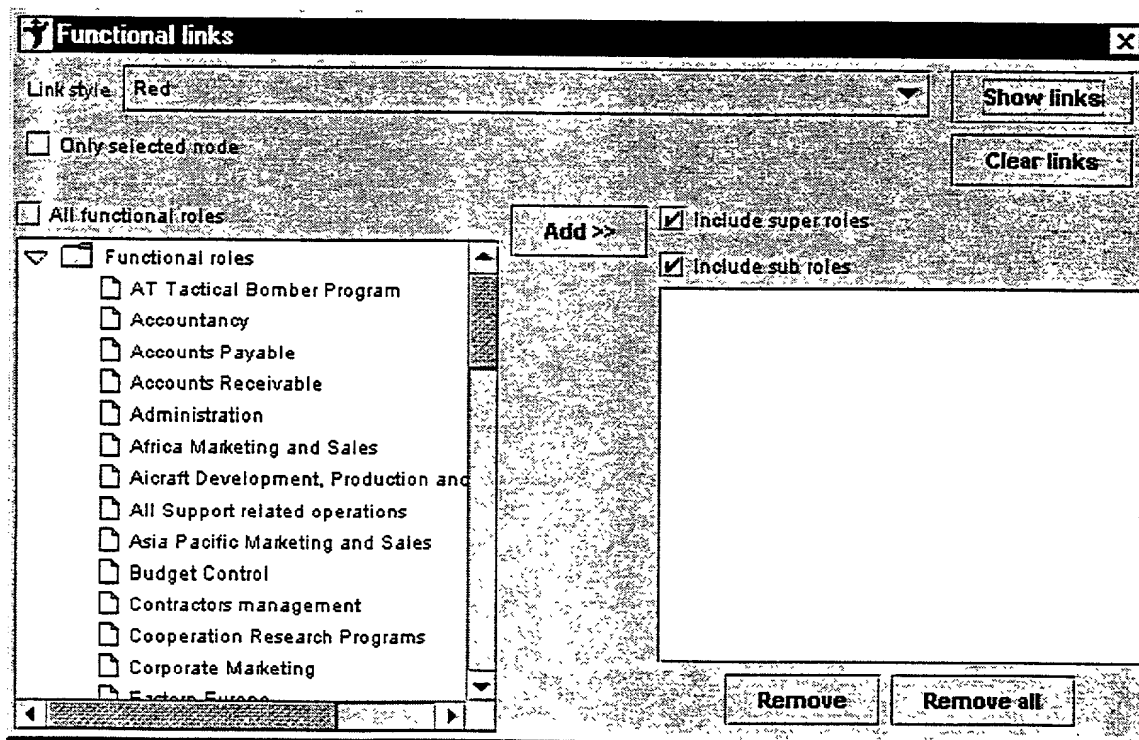


Figure 13

1404 1402

**MORSE Search** [X]

Requester: Amanda Calder [1404] [1402] Locate

Roles: [1406]

Perform search [1408]

Result:

Figure 14



**Select roles**

Available roles:

- ☐ Cooperation Research Programs
- ☐ Corporate Marketing
- ☐ Eastern Europe
- ☐ Europe Marketing and Sales
- ☐ Europe, Middle East & Africa Mark
- ☐ F5 Business Jet Program
- ☐ FJ Program Management
- ☐ Finance
- ☐ Financial Studies
- ☐ Fundamental Research
- ☐ Fundamental and Aeronautics Res
- ☐ General Ledger
- ☐ Ground Support
- ☐ Handles Benefits
- ☐ Home Sales
- ☐ IT Production
- ☐ IT support
- ☐ Industrial Equipment Procurement

1502

Add >

Selected roles:

IT support

Remove All

Ok

Cancel

Figure 15

**MORSE Search** [X]

Requester:

Roles:

Result:

- IT
  - Ian Salvador (Information Systems)

Figure 16

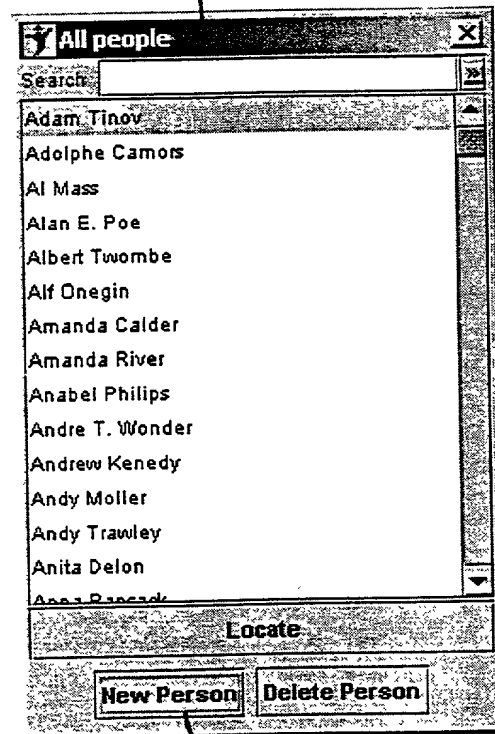


Figure 17

67 All people

Search:

Person name:

Hierarchical role:

Notes id:

Functional Roles

Organization Units

Person 0

Adam Tinov

Adolphe Camos

Al Mass

Alan E. Poe

Albert Twombe

Alf Onegin

Amanda Calder

Amanda River

Anabel Philips

Andre T. Wonder

Andrew Kenedy

Andy Moller

Andy Trawley

Andy Dolan

Locate

New Person Delete Person

Add Functional Role

Add Organization Unit

Figure 18

1904

1902

Import Users Select All Users Save and Close

### Address Book Import

Address Book Database Names.nsf  
Server

User Name Pattern

- ☐ Last Name + First Name
- ☐ First Name + Last Name
- ☐ Last Name + Middle Name + First Name
- ☒ First Name + Middle Name + Last Name

Import Options

- ☐ Only import Notes user names for Planner people
- ☐ Import All Users (global import over 64K Notes field limit)

Requested Users

Imported Users

1926

Figure 19

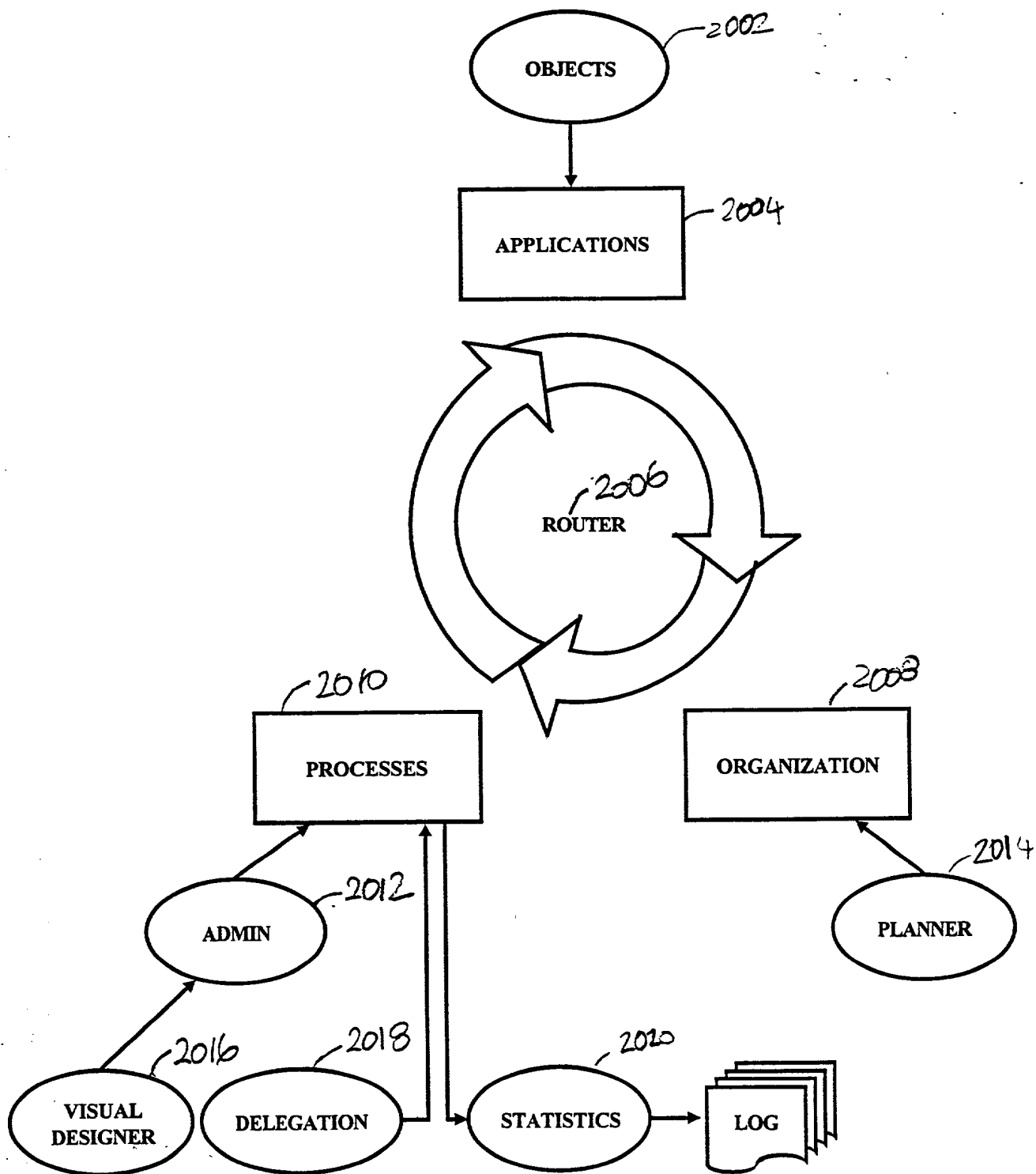


Figure 20